

The Workspace Provides Control & Audit



Meet Sarah - she monitors all approvals in one place so she can spot trends, report instantly and improve how the team works ...

Using the Approvals Agent Workspace could not be easier. All requests clearly labelled

Kim - The Task Automation Platform

Help Craig Paterson User Menu

Get Started
Examples
Applications
Select category and use form.

1. Use Cases (Examples)
2. Core Functionality

+ Create Application
Settings 9.4.1

Assigned 6 Records Draft

Search

Subject	Activity	Note	Approval	Attachment	Version	Action
Pricing Exception Request Demo Site Applications - Pricing Exception ... Craig Paterson Jul 21, 2025	Downloaded ...		Commercial Operations-Awaiting A...	3	2	
Pricing Exception Request Demo Site Applications - Pricing Exception ... Craig Paterson Jul 21, 2025	Email sent	approved	Override (no step)-Completed	3	3	
Pricing Exception Request ABC France... Demo Site Applications - Pricing Exception ... Craig Paterson Jul 17, 2025	Email sent	Cp was off and happy to approve	Commercial Finance-Awaiting Appr...	3	3	
Pricing Exception Request Demo Site Applications - Pricing Exception ... Craig Paterson Jul 16, 2025	Email sent	no buget	Override (no step)-Aborted	3	3	
Pricing Exception Request Demo Site Applications - Pricing Exception ... Craig Paterson Jun 16, 2025	Email sent		Regional MD-Completed	2	2	
Pricing Exception Request Demo Site Applications - Pricing Exception ... Craig Paterson Jun 13, 2025	Downloaded ...		MD Regional-Awaiting Approval	1	1	

Approval status easy to view

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Help Craig Paterson User Menu

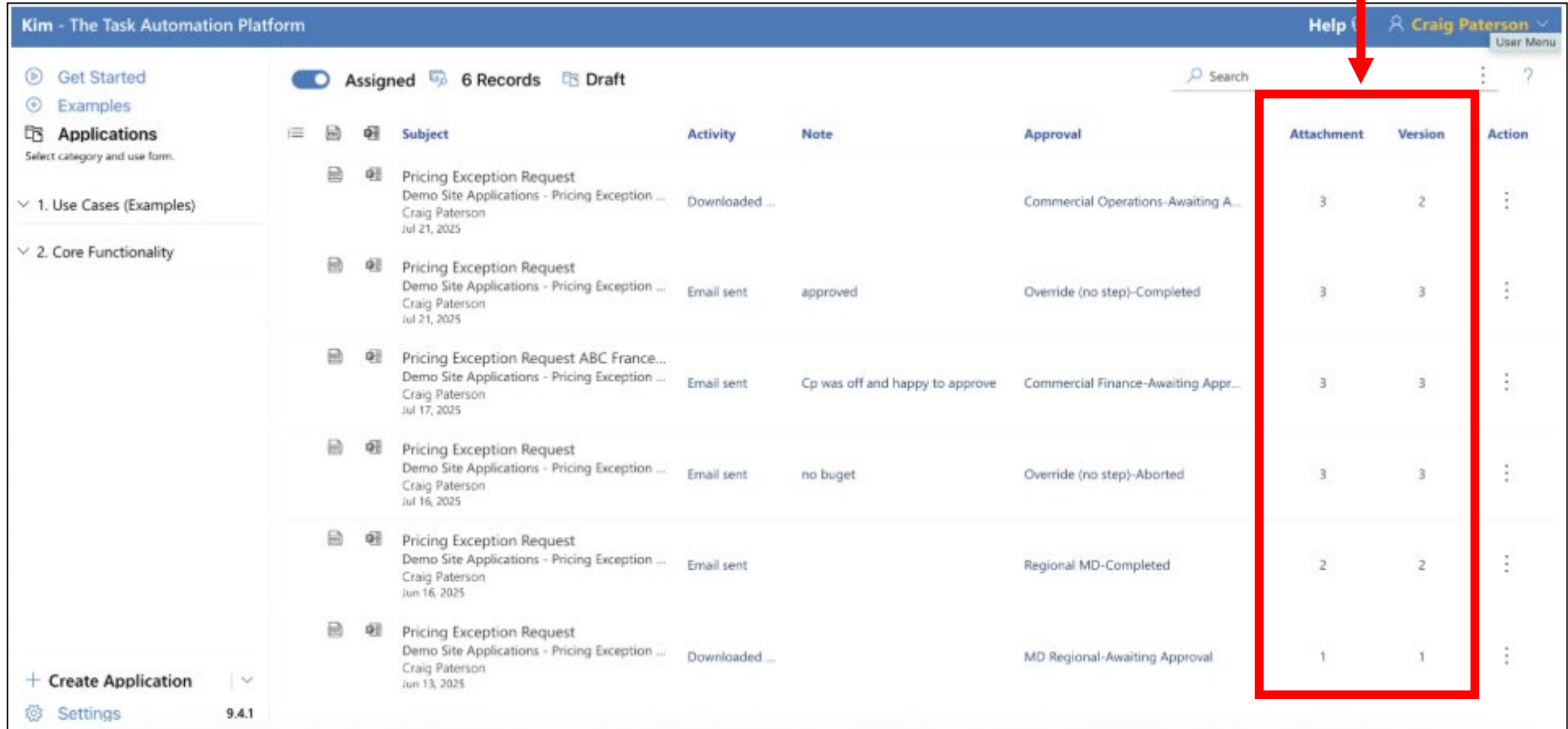
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+ Create Application

Settings 9.4.1

A range of available actions

The screenshot displays the 'Kim - The Task Automation Platform' interface. On the left, there's a sidebar with 'Get Started', 'Examples', and 'Applications' sections. The main area shows a list of applications under the 'Assigned' filter, with 6 records. A context menu is open over the list, showing a range of actions: Activity, Attachment, Copy, Delete, Download, Manage, Note, Preview, Renewals & Alerts (Override), Send Mail, Send Webform Update Link, Share, Subform, and Update Webform. A red arrow points from the 'A range of available actions' text to the context menu. Another red arrow points from the 'Action' column header in the table to the context menu.

Subject	Activity	Attachment	Version	Action
Pricing Exception Request Demo Site Applications - Pricing Exception ... Craig Paterson Jul 21, 2025	Downloaded ...			
Pricing Exception Request Demo Site Applications - Pricing Exception ... Craig Paterson Jul 21, 2025	Email sent			
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Advanced Search

Search ☐ Include Attachments

Username

Created From To

Updated From To

Subject

Notes

Application

Campaign

Activity

☐ Include Closed

Search Close

Comprehensive search

Help Craig Paterson User Menu

Search

Approval	Attachment	Version	Action
Commercial Operations-Awaiting A...	3	2	
Override (no step)-Completed	3	3	
approve Commercial Finance-Awaiting Appr...	3	3	
Override (no step)-Aborted	3	3	
Regional MD-Completed	2	2	
MD Regional-Awaiting Approval	1	1	

**Bulk data download
& other actions**

The screenshot shows the Kim - The Task Automation Platform interface. The user menu for Karl Chapman is open, displaying the following options:

- Bulk Download
- My Billing Plan
- My Profile
- My Activity
- Privacy Policy
- Terms and Conditions
- Data Processing Agreement
- Get Support/Contact Us
- Log Out

A red arrow points from the user menu to the table header. The table displays a list of records with columns: Approval, Attachment, Version, and Action.

Approval	Attachment	Version	Action
Commercial Operations-Awaiting A...	3	2	⋮
Override (no step)-Completed	3	3	⋮
Commercial Finance-Awaiting Appr...	3	3	⋮
Override (no step)-Aborted	3	3	⋮
Regional MD-Completed	2	2	⋮
MD Regional-Awaiting Approval	1	1	⋮

It is that simple ...



and everyone is happy!